

# WISEid Detailed User Guide

Ver. 2.2 – February 23, 2015

This guide is intended to assist users of DPI's WISEid application.

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# Summary of Process for New LEAs

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- 1) Get WAMS account with access to WISEid. See the [Access and Security](#) section of this user guide.
- 2) Update your staff data collection contact info. This is important so DPI knows the correct persons to contact for your LEA. See the [Update Contact Info](#) section of this user guide.
- 3) Complete the process to get your historical staff connected with WISEids. See the [First Year Historical Staff Data Bridge Process](#) section of this user guide.  
**Phase 2 and 3 LEAs should complete this process and receive DPI approval before continuing on to next step.**
- 4) Generate WISEids for all new staff.
  - a. If you plan on entering data through the application User Interface one person at a time see the [Searching For, Creating and Editing Persons](#) section of this user guide
  - b. If you plan on entering data through the file upload process see the [File Tasks](#) section of this user guide.
- 5) Export WISEids for all your staff from the WISEid system for import into your district information systems. Either by:
  - a. [Person List by Local Person ID](#)
  - b. [Download Transaction History](#) processing
- 6) Upload Contract and Assignments. If you are copying last year's Contracts and Assignments forward inside the WISEid system complete Step 5 of [First Year Historical Staff Data Bridge Process](#) section. In either case to upload the Contracts and Assignments file see the [File Tasks](#) sections of this user guide.
- 7) Complete the validation and correction of staff data issues described in the [Validate Staff Data](#) section of this user guide. **UNDER PARTIAL CONSTRUCTION INCLUDING INTERFACE TO VIEW**, but you can run validations after each bi-weekly release to check for new validation issues for your correction or review. Validation interface will be expanded upon soon.
- 8) ELO License Status reporting review. **STILL UNDER CONSTRUCTION. Will update when available.**
- 9) Staff data reporting check off and signing process and data snapshot. **STILL UNDER CONSTRUCTION. Will update when available.**

# Access and Security

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In order to use WISEid you must first obtain a WAMS ID. For detailed procedures and instructions, please see the WAMS User Guide: <http://dpi.wi.gov/sites/default/files/imce/wise/pdf/wams-guide.pdf> . Please note use should use WAMS account connected to your work email as this system will be used for work purposes. Do not reuse a WAMS account created for ELO which is for your personal use and would use your personal non-work email account.

Once you have obtained a WAMS ID you must be assigned a WISEid user role. User roles must be assigned by your district's WISEid Application Administrator(s). **If you do not know who that is you can use this application to look it up:** <https://apps2.dpi.wi.gov/ldsutil/admin/>.

**For detailed information about security roles and responsibilities, please read the Secure Home Information page:** [http://wise.dpi.wi.gov/wise\\_securehomeinfo](http://wise.dpi.wi.gov/wise_securehomeinfo).

Use your WAMS ID and password to log into the application via the Secure Home menu (<https://apps2.dpi.wi.gov/secure/>) or log in directly (<https://wisedata.dpi.wi.gov/WISEid/>).

If you cannot remember your WAMS ID or password, or if your password is locked, please visit the WAMS web site at <https://on.wisconsin.gov/WAMS/home> and click on the Account Recovery link. DPI does not have the ability to reset passwords.

For all other issues, please open a DPI help desk ticket here: <http://wise.dpi.wi.gov/asm-help-ticket>.

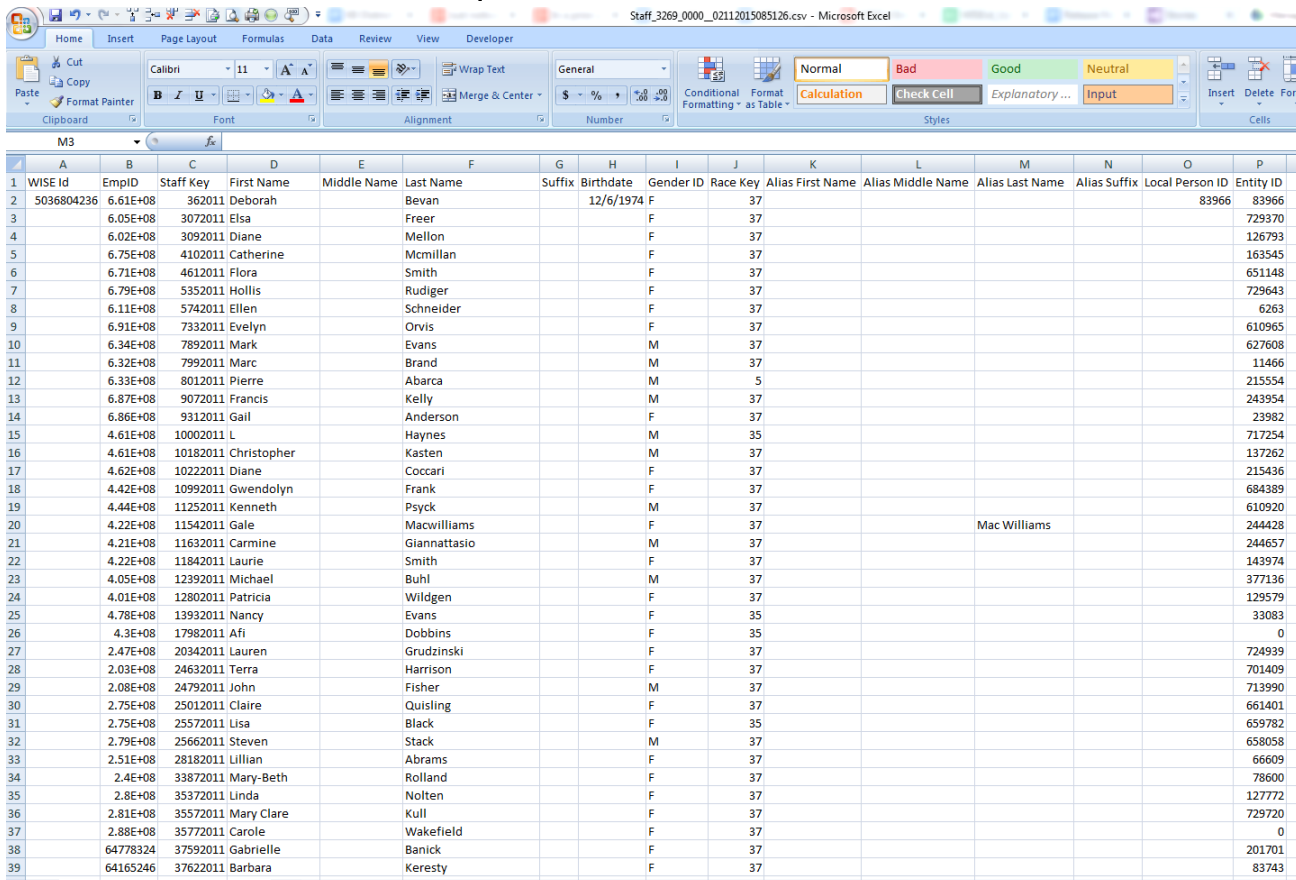
# First Year Historical Staff Data Bridge Process

This process will be needed for all districts as they onboard to the new WISEid system to join the previous four years of staff data to WISEid records. Steps of the process are below. All LEA's who were not part of the WISE Wave 1 should complete this process before they start using the rest of the system. All Wave 1 districts should complete this process now, but it doesn't affect their continuation of work in the regular WISEid system. **Please note - to do the Historical Person Download you need to be given AgencyAdmin role access in WISEid to your LEA by your DSA.** If you do not have AgencyAdmin role access the Historical Person Download will be light blue and the button will not be clickable.

## Step 1:

LEA Download Historic person data file with last 4 years of staff persons. Located in WISEid application under **Reports/Validations > Manage Staff Data**. Choose **Historic Person Download** blue button. File will appear in your Internet browser file download when complete. Please be patient as it may take up to a minute for the file download to complete.

### Historical Person Download



WISE ID	EmpID	Staff Key	First Name	Middle Name	Last Name	Suffix	Birthdate	Gender ID	Race Key	Alias First Name	Alias Middle Name	Alias Last Name	Alias Suffix	Local Person ID	Entity ID
5036804236	6.61E+08	362011	Deborah		Bevan		12/6/1974	F	37					83966	83966
	6.05E+08	3072011	Elsa		Freer			F	37						729370
	6.02E+08	3092011	Diane		Mellon			F	37						126793
	6.75E+08	4102011	Catherine		Mcmillan			F	37						163545
	6.71E+08	4612011	Flora		Smith			F	37						651148
	6.79E+08	5352011	Hollis		Rudiger			F	37						729643
	6.11E+08	5742011	Ellen		Schneider			F	37						6263
	6.91E+08	7332011	Evelyn		Orvis			F	37						610965
	6.34E+08	7892011	Mark		Evans			M	37						627608
	6.32E+08	7992011	Marc		Brand			M	37						11466
	6.33E+08	8012011	Pierre		Abarca			M	5						215554
	6.87E+08	9072011	Francis		Kelly			M	37						243954
	6.86E+08	9312011	Gail		Anderson			F	37						23982
	4.61E+08	10002011	L		Haynes			M	35						717254
	4.61E+08	10182011	Christopher		Kasten			M	37						137262
	4.62E+08	10222011	Diane		Coccarri			F	37						215436
	4.42E+08	10992011	Gwendolyn		Frank			F	37						684389
	4.44E+08	11252011	Kenneth		Psych			M	37						610920
	4.22E+08	11542011	Gale		Macwilliams			F	37			Mac Williams			244428
	4.21E+08	11632011	Carmine		Giannattasio			M	37						244657
	4.22E+08	11842011	Laurie		Smith			F	37						143974
	4.05E+08	12392011	Michael		Buhl			M	37						377136
	4.01E+08	12802011	Patricia		Wildgen			F	37						129579
	4.78E+08	13932011	Nancy		Evans			F	35						33083
	4.3E+08	17982011	Afi		Dobbins			F	35						0
	2.47E+08	20342011	Lauren		Grudzinski			F	37						724939
	2.03E+08	24632011	Terra		Harrison			F	37						701409
	2.08E+08	24792011	John		Fisher			M	37						713990
	2.75E+08	25012011	Claire		Quisling			F	37						661401
	2.75E+08	25572011	Lisa		Black			F	35						659782
	2.79E+08	25662011	Steven		Stack			M	37						658058
	2.51E+08	28182011	Lillian		Abrams			F	37						66609
	2.4E+08	33872011	Mary-Beth		Rolland			F	37						78600
	2.8E+08	35372011	Linda		Nolten			F	37						127772
	2.81E+08	35572011	Mary Clare		Kull			F	37						729720
	2.88E+08	35772011	Carole		Wakefield			F	37						0
	64778324	37592011	Gabrielle		Banick			F	37						201701
	64165246	37622011	Barbara		Keresty			F	37						83743

The screenshot shows the WISEid web application interface. At the top, there's a header with the Wisconsin Department of Public Instruction logo and the text 'Welcome Jack Frost Agency: Madison Metropolitan School District'. Below this is a navigation bar with 'Home' and 'WISEid Help'. The left sidebar contains a 'Person' section with 'Search/Edit' and 'Report duplicates', a 'File Tasks' section with 'Upload', 'Results', 'Review matches', and 'Download transaction history', a 'Reports / Validations' section with 'Staff list', 'Manage Staff Data', and 'Validate Staff Data', and an 'Admin menu' with various system management options. The main content area is titled 'Staff / Manage Staff Data' and contains several buttons: 'Delete Staff Contracts', 'Delete Staff Contracts & Assignments', 'Historical Person Download', 'Upload Historical Person CSV File', 'Historical Contract Download', and 'Historical Assignment Download'. The 'Upload Historical Person CSV File' section has a 'Choose Data File' dropdown menu showing 'No file chosen' and an 'Upload' button. At the bottom, there's a footer with 'State Superintendent of Public Instruction Tony Evers Department of Public Instruction' and a 'WISEid feedback' link.

## Step 2:

LEA Fix missing data in downloaded file

1. Join to LEA local data sets using EmpID (SSN)
2. Fill in missing data and correct any errors - most especially missing Birthdate field for non-licensed staff and make sure all race keys are populated with numeric codes. Also, please populate the Local Person IDs if district is using them (system is defaulted to use Local Person Ids). **If you need to change a birthdate that already exists (not missing) please contact DPI Customer Services by help ticket [http://lbstat.dpi.wi.gov/lbstat\\_helptool](http://lbstat.dpi.wi.gov/lbstat_helptool) or phone 1-800-507-5744.**
3. Delete EmpID field (will be ignored in upload processing if LEA forgets).
4. **LEA SHOULD NOT TOUCH Staff Key column** - key is used to join data back to DPI's data. Key also has most recent year of a staff person reported 1202 staff record in key as the last 4 digits of the key for the last 4 years of staff person's data.

## Step 3:

LEA Upload Historic Person corrected data file using **Upload Historical Person CSV File** located on the **Reports / Validations > Manage Staff Data** page. Please be patient as this may take a minute.

This is a close-up of the 'Upload Historical Person CSV File' section from the previous screenshot. It shows a light blue header bar with the title 'Upload Historical Person CSV File'. Below this is a 'Choose Data File:' label followed by a dropdown menu that currently displays 'No file chosen'. At the bottom of this section is a blue 'Upload' button with a white upward arrow icon.

A green highlighted message saying "File was uploaded Successfully!" will appear on the screen when the upload has been completed.

File was uploaded Successfully!

## Upload Historical Person CSV File

Choose Data File:

Choose File No file chosen

Upload

### Step 4:

#### WISEid Wave 2 and 3 LEAs

Wait for DPI Customer Services to notify them that is OK to proceed with further use of the system. DPI will be loading all historical staff into the WISEid system and creating WISEids for them including attaching the LEA's Local Person IDs that were supplied in this upload process. The next steps for LEAs once DPI provides the OK to proceed will be to generate WISEids for new staff and if they need last year's Contracts and Assignments to copy forward they can then complete that step.

#### WISEid Wave 1 LEAs

Continue to use the rest of the WISE system. However, if Wave 1 LEAs need last year's Contracts and Assignments to copy forward to the current year they will need to wait for the OK from DPI that all their historical data now has WISEids attached to them and it OK to generate the files.

### Step 5:

**Only for those that need to copy last year's Contract and Assignment data forward to this year.** This should only be complete after DPI has given your LEA the OK that DPI has generated all Historical WISEid person data for your LEA after your LEA has completed Step 3 above.

For districts who need to copy last year's Assignment and Contract Data to this year they should generate Assignment and Contract Files using the links on the **Reports / Validations > Manage Staff Data** page for **Historical Contract Download** and **Historical Assignment Download**. If these are ready the WISEid column will be populated for all records. LEA can then upload these files through the normal Contract and Assignment upload process. If LEA prefers they can also make modifications to the CSV files instead of using UI to edit.

## Home Page

The Home screen provides a brief description of WISEid features and helpful messages that will assist you as you work.

The screenshot shows the WISEid Home Page. At the top, there is a header with the Wisconsin Department of Public Instruction logo and the text "WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION". Below the header, there is a navigation bar with "Home" and "WISEid Help" links. The main content area is divided into a left sidebar and a main panel. The sidebar contains sections for "Person" (Search/Edit, Report duplicates), "File Tasks" (Upload, Results, Review matches, Download transaction history), "Reports / Validations" (Staff list, Manage Staff Data, Validate Staff Data), and "Admin menu" (Debug features, Update contact info). The main panel displays a "Welcome Testy McTesterton" message, an "Agency:" dropdown, and a "Logout" button. A green banner message states: "★ Gold star for you! No validation problems detected with your staff members." Below this, there is an "About WISEid" section explaining the application's purpose and the unique Identifier number (ID) assigned to each person. It includes two bullet points: "For staff, the WISEid replaces the social security number (SSN) used by the PI-1202 Staff data collection. Any employee in your HR system can get a WISEid. All future DPI data collections will soon begin to use this unique number." and "For students, the old WSN will become the new WISEid. Existing WSN numbers will not change. WISEid will eventually replace the existing WSLS system and have greater functionality for schools...". At the bottom of the main panel, there are "Save" and "Cancel" buttons. An orange arrow points from a text box to the green banner message. Another orange arrow points from a text box to a "WISEid feedback" button located at the bottom right of the page. A third orange arrow points from a text box to the "Save" button.

This message provides a quick status update.

Click this button to leave DPI feedback about the application.

Use the menu on the left to navigate. Use the **Person** section to search for, edit person or work with duplicate ID's. The **File Tasks** section is for uploading and working with data files. View reports and manage and validate your data in the **Reports/Validations** section. Depending on their role, some users may also have access to the **Admin Menu**. If the user has access to multiple agencies, the **Change Agency** button is used to select the desired agency. If applicable to the user, the **Change Agency** button is located just to the left of the Logout button, near the upper right of the screen.

There are two ways to work with WISEid data—manually using the application user interface screens, or via a file upload. If desired, a combination of both methods may be used. For example, you may upload your data using a file, and later edit the data manually for an individual person using the application screens.



# Searching For, Creating and Editing Persons

**Before creating a new WISEid you must first search for that person** to see if a WISEid already exists. **This is a very important step** which could save much effort later in dealing with duplicates.

Use the **Search/Edit** link to search for a person. First and last name are required fields, and there are other criteria to use to narrow the results. It is important to find a match if one exists, so please remember to use maiden names, other names and aliases, etc., as appropriate. If no match is found you are given the option of creating a new record. This procedure is discussed in detail in the [“Creating a WISEid”](#) section of this document.

The screenshot displays the WISEid Search/Edit page. The header includes the Wisconsin Department of Public Instruction logo and a navigation bar with links for Home, WISEid Help, and Logout. The left sidebar contains a menu for Person (Search/Edit, Report duplicates), File Tasks (Upload, Results, Review matches, Download transaction history), Reports / Validations (Staff list, Manage Staff Data, Validate Staff Data), and Admin menu (Debug features, Update contact info). The main content area is titled 'Staff / Search/Edit' and contains a search form. The form has fields for ID (WISEid or Local Person ID), First Name (Smith), Middle Name, Last Name (Jane), Birthdate (mm/dd/yyyy), Gender (Select Gender...), and Suffix (Suffix...). A blue 'Search' button is highlighted with an orange arrow and a callout box that says 'Use this button to begin your search.' Below the form, a message states 'Sorry, no similar match found to your search criteria.' and offers a 'Create new record' button.

## Search/Edit Fields

ID	The WISEid
FIRST NAME	The person's first name
MIDDLE NAME	The person's middle name
LAST NAME	The person's last name
BIRTHDATE	The person's birthdate, in this format: MM/DD/YYYY
GENDER	The person's gender
SUFFIX	A suffix to the person's name, if applicable



To start a search, enter information in all or some of the fields on the screen and click on the Search button. Note that you are required to enter First Name and Last Name, unless you are searching by WISEid or Local Person ID in the ID field. If you enter a WISEid or Local Person ID in the ID field, you are not required to enter any other search criteria. If you search for a WISEid deactivated because of a duplicate merger, you will see the results for the active WISEid. Duplicates are explained in the [“Report Duplicates”](#) section of this document.

Once you click on the search button you will see the Search/Edit screen:

The screenshot shows the WISEid Search/Edit interface. The header includes the Wisconsin Department of Public Instruction logo, a welcome message for Testy McTesterton, the agency name (Deerfield Community School District), and a Logout button. The left sidebar contains navigation links for Person (Search/Edit, Report duplicates), File Tasks (Upload, Results, Review matches, Download transaction history), Reports / Validations (Staff list, Manage Staff Data, Validate Staff Data), and Admin menu (Debug features, Update contact info). The main content area is titled 'Staff / Search/Edit' and includes a search instruction: 'Search for a person to either view or edit their information. Only create new people after a thorough search.' Below this is a search form with fields for ID (WISEid or Local Person ID), Middle Name, Last Name (containing 'Roy'), Birthdate (mm/dd/yyyy), and Suffix (a dropdown menu). A 'Search' button and a 'Clear' button are also present. An annotation points to the plus symbol in the ID field, stating: 'Click the plus symbol to expand detail view.' Below the search form is a table of search results. An annotation points to the first WISEid in the table, stating: 'Click on the WISEid to view Personal and Staff Information.'

Details	WISEid	Local person ID	First name	Middle name	Last name	Suffix	Birthdate	Gender
+	1001253171		AMIRA	ANNA	ROY		4/6/1998	Female
+	6524138237		Amira		Roy		3/3/2002	Female
+	3665134704		amira		roy		4/11/2014	Female
+	1016245106		AMARI	MARIECANDICE	RAY		2/26/2001	Female
+	1022153358		AMARA	ANGEL	REA		12/20/2006	Female

Be sure that no results match your criteria before creating a new Record

Have you tried searching for former names?

Or would you like to [Create new record](#)

WISEid feedback

The screenshot shows the WISEid interface for the Wisconsin Department of Public Instruction. The top navigation bar includes 'Home', 'WISEid Help', and a 'Logout' button. The user is logged in as 'Testy McTesterton' for the 'Deerfield Community School District'.

On the left, the 'Person' menu is expanded, showing options like 'Search/Edit', 'Report duplicates', 'File Tasks', and 'Reports / Validations'. An annotation points to this menu with the text: "Click on the WISEid to view Personal and Staff Information."

The main area is titled 'Staff / Search/Edit'. It contains a search form with fields for 'ID' (WISEid or Local ID), 'First Name', 'Middle Name', 'Last Name', 'Birthdate', and 'Suffix'. A 'Search' button is present. An annotation points to the search form with the text: "Click the plus symbol to expand detail view."

Below the search form is a table of staff members. The table has columns: 'Details', 'WISEid', 'Local person ID', 'First name', 'Middle name', 'Last name', 'Suffix', 'Birthdate', and 'Gender'. The 'Details' column contains plus symbols. An annotation points to one of these plus symbols.

Details	WISEid	Local person ID	First name	Middle name	Last name	Suffix	Birthdate	Gender
+	1001253171		AMIRA	ANNA	ROY		4/6/1998	Female
+	6524138237		Amira		Roy		3/3/2002	Female
+	3665134704		amira		roy		4/11/2014	Female
+	1016245106		AMARI	MARIECANDICE	RAY		2/26/2001	Female
+	1022153358		AMARA	ANGEL	REA		12/20/2006	Female

Below the table, there is a message: "Be sure that no results match your criteria before creating a new Record". A section titled "Have you tried searching for former names?" includes a "Create new record" button.

You can view the Aliases, or alternate names associated with the person, by clicking on the plus symbol in the Details column. Aliases included maiden names, nicknames or names other than legal names. For example, Jane Smith's maiden name may be Jane Jones, or you may find Robert Marshall under Bob Marshall.

Birthdate

mm/dd/yyyy

Gender

Select Gender...

Suffix

Suffix...

Search

Clear

Details	WISEid	Local person ID	First name	Middle name	Last name	Suffix	Birthdate	Gender																
<div> <div>new aliases</div> <div> <div></div> </div> </div>	1001253171	11958	AMIRA	ANNA	ROY		4/6/1998	Female																
<div>Alias(es)</div> <table> <thead> <tr> <th>First name</th> <th>Middle name</th> <th>Last name</th> <th>Suffix</th> </tr> </thead> <tbody> <tr> <td>AMIRA</td> <td>ANNA</td> <td>ROY</td> <td></td> </tr> <tr> <td>Anna</td> <td>A</td> <td>Roy</td> <td></td> </tr> <tr> <td>Amira</td> <td>Anna</td> <td>Royal</td> <td></td> </tr> </tbody> </table>									First name	Middle name	Last name	Suffix	AMIRA	ANNA	ROY		Anna	A	Roy		Amira	Anna	Royal	
First name	Middle name	Last name	Suffix																					
AMIRA	ANNA	ROY																						
Anna	A	Roy																						
Amira	Anna	Royal																						
+	3665134704		amira		roy		4/11/2014	Female																
+	6524138237		Alan		Roy		3/3/2002	Male																
+	4057588264		Amera		Roy		12/12/1999	Female																
+	1016245106		AMARI	MARIECANDICE	RAY		2/26/2001	Female																
+	1022153358		AMARA	ANGEL	REA		12/20/2006	Female																

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Here is what you see when you click on the WISEid to view the Personal, Contact and Assignment details:

**Return to your search results using the breadcrumbs.**

**Click here to view or edit the Personal Information.**

**Personal Information**

Birthdate: 4/6/1998 | Gender: Female | Entity ID: | Edit

Racial Ethnic Category: 0037 - White

**Current Year Contract Details**

Contract Days: | Contract Salary: | Fringe Benefits: | Highest Degree: Select Degree...  
 District Experience: | Total Experience: | Is the salary final for this school term? Yes No  
 Local Use: | Local ID: |

Save Reset Cancel

**Current Position(s)** Add Assignment

	Position	Area of Assignment	Working LEA	Working School	FTE	Assignment Type	
+	53 - Teacher	0300 - English	0014 - Adams-Friendship Area School District	0130 - Adams-Friendship EI	100	Professional - Regular Education	✕

WISEid feedback

## Personal Information Fields:

BIRTHDATE	The person's birthdate, in this format: MM/DD/YYYY
GENDER	The person's gender
ENTITY ID	Educator Licensing Online person's ID
RACIAL/ETHNIC CATEGORY	DPI code for the person's race/ethnicity code

## Current Year Contract Details Fields:

CONTRACT DAYS	User's selected agency's # of contract days
CONTRACT SALARY	User's selected agency's contract salary in whole dollars
FRINGE BENEFITS	User's selected agency's Contract fringe benefits in whole dollars
HIGHEST DEGREE	User's selected agency's Contract Highest Degree of person
DISTRICT EXPERIENCE	User's selected agency's Contract District Experience
TOTAL EXPERIENCE	User's selected agency's Contract Total Experience
LOCAL USE	Used by districts to include local codes, etc that will assist them in submitting and reviewing information for their agency's Contracts.
LOCAL ID	A local contract ID for this record. Unique field to be used by your agency for verification purposes to make sure the correct local staff contract record is being used by DPI.

## WISEid – User Guide

To view or edit the Personal Information, click the Edit button located in the light blue bar to the right of the heading. Depending on the user's role, editing may not be available for all information.

**Person**  
Search/Edit  
Report Duplicates  
Person Change History  
My Tasks  
Upload  
Results

Staff / Search Results / **Edit Staff** / Personal Information

**Personal Information**

First Name: KENNETH \* Middle Name: D Last Name: JONES  
Birthdate: 10/03/1992 \* Gender: Male \* Entity ID:   
Race/Ethnicity  
Part One: Is this person Hispanic or Latino? (Must choose one)  
☐ Hispanic or Latino  
☒ Not Hispanic or Latino  
Part Two: Select one or more of the following categories that apply to this person  
☐ American Indian or Alaska Native  
☐ Asian  
☒ Black or African American  
☐ Native Hawaiian or Other Pacific Islander  
☒ White

Save Reset Cancel

**Name(s)**

+ Add Alias

First Name	Middle Name	Last Name	Suffix
KENNETH	D	JONES	

**Local Person ID(s)**

+ Add Local Person Id

Local Person Id	Description	Agency Name
-----------------	-------------	-------------

WISEid feedback

When editing Personal Information a new menu item appears – Person Change History

Return to your search results using the breadcrumbs.

The Personal Information section displays the legal name associated with the WISEid. The Entity ID is the ELO system's unique identifier for licensed individuals; in the past this was called the File ID Number or File Number. Racial/Ethnicity information is entered on this screen.

In the Name(s) section are displayed all of the aliases associated with the WISEid. The legal name is also displayed there for reference. Additional aliases may be added by clicking on the Add Alias button.

The Local Person ID(s) section displays your agency's unique identifier associated with the person. The Local Person ID is **not** the WISEid, but rather an identifier assigned by your SIS, HR system or other local district software. **NOTE: Social Security Numbers should NOT be stored in the Local Person ID field nor anywhere else in the WISEid system.**



When editing Personal Information a new menu item, **Person Change History**, appears under Person on the left hand navigation pane:

This provides you an audit trail of all Personal Information changes that have been made to this WISEid. Be patient as it may take a few seconds for the change list details to load. To view details, click on the plus icon under the Details column. Note that there are multiple tabs; click on a blue header to view that tab. If there are changes viewable under a particular tab, there will be a number icon indicating this.

# Creating a New WISEid

A new WISE id can be created manually from the Search/Edit screen. **Remember that all search options should be tried first to avoid creating a duplicate.**

To create an ID, click on the red Create New Record button.

The screenshot shows the WISEid Search/Edit interface. The header includes the Wisconsin Department of Public Instruction logo and the user's name, Testy McTesterton. The left sidebar contains navigation links for Person, File Tasks, Reports / Validations, and Admin menu. The main content area is titled 'Staff / Search/Edit' and contains a search form with fields for ID, First Name, Middle Name, Last Name, Birthdate, Gender, and Suffix. Below the search form, a message states 'Sorry, no similar match found to your search criteria.' and asks 'Have you tried searching for former names?'. At the bottom, there is a red button labeled 'Create new record'. An orange arrow points from a callout box to this button. The callout box contains the text: 'Use this button to begin creating a new record.'

Before you can proceed you must click the OK button.

The screenshot shows a confirmation dialog box with the following text: 'The page at https://uawisedata.dpi.wi.gov says: This action will create new WISEid. Would you like to continue?'. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

Any information you may have previously used as search criteria will be pre-filled on the Create Staff screen. Please note that many of the fields are required, including Race/Ethnicity.

WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

Welcome Testy McTesterton Agency: Deerfield Community School District

Home WISEid Help Logout

Person

- Search/Edit
- Report duplicates

File Tasks

- Upload
- Results
- Review matches
- Download transaction history

Reports / Validations

- Staff list
- Manage Staff Data
- Validate Staff Data

Admin menu

- Debug features
- Update contact info

Staff / Create Staff

Personal Information

First Name: Amera Middle Name: Last Name: Roy Suffix: None

Birthdate: mm/dd/yyyy Gender: Select Local Person Id:

Race/Ethnicity

Part One: Is this person Hispanic or Latino? (Must choose one)

- ☐ Hispanic or Latino
- ☐ Not Hispanic or Latino

Part Two: Select one or more of the following categories that apply to this person

- ☐ American Indian or Alaska Native
- ☐ Asian
- ☐ Black or African American
- ☐ Native Hawaiian or Other Pacific Islander
- ☐ White

Save Cancel

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WISEid feedback

Once you have entered the information, click on the Save button. After the WISEid is saved the Edit Staff screen will display, with the new WISEid featured at the top to the left of the person's name.

The screenshot shows the WISEid web application interface. At the top, there's a header with the Wisconsin Department of Public Instruction logo and the text 'Welcome Testy McTesterton Agency: Deerfield Community School District'. Below this is a navigation bar with 'Home' and 'WISEid Help' links, and a 'Logout' button. On the left, there's a sidebar menu with categories: 'Person' (Search/Edit, Report duplicates), 'File Tasks' (Upload, Results, Review matches, Download transaction history), 'Reports / Validations' (Staff list, Manage Staff Data, Validate Staff Data), and 'Admin menu' (Debug features, Update contact info). The main content area is titled 'Staff / Search Results / Edit Staff' and shows the details for '4057588264 - Amara Roy'. The 'Personal Information' section includes fields for Birthdate (12/12/1999), Gender (Female), Entity ID, and Racial Ethnic Category (0037 - White). The 'Current Year Contract Details' section includes fields for Contract Days, Contract Salary, Fringe Benefits, Highest Degree (Select Degree...), District Experience, Total Experience, Is the salary final for this school term? (Yes/No), Local Use, and Local ID. At the bottom of the form are 'Save', 'Reset', and 'Cancel' buttons. A 'Current Position(s)' section is partially visible at the bottom, along with an 'Add Assignment' button and a 'WISEid feedback' link.

The person's Current Year Contract Details can now be entered. Note that this contract information applies to the agency you have selected. **If your user role grants you access to multiple agencies, remember to have the appropriate agency selected.** If the previous year's contract data has been copied over there may be contract information already displaying. The Reset button can be used to clear all of the Contract Details fields.

## Current Year Contract Details Fields:

CONTRACT DAYS	Users selected agency's # of contract days for person
CONTRACT SALARY	Users selected agency's # of contract salary for person in whole dollars
FRINGE BENEFITS	Users selected agency's Contract fringe benefits in whole dollars for person
HIGHEST DEGREE	Users selected agency's Contract Highest Degree of person
DISTRICT EXPERIENCE	Users selected agency's Contract District Experience for person
TOTAL EXPERIENCE	Users selected agency's Contract Total Experience for person
LOCAL USE	Used by districts to include local codes, etc, that will assist them in submitting and reviewing information for their agency's Contracts.
LOCAL ID	A local contract ID for this record. Unique field to be used by your agency for verification purposes to make sure the correct local staff contract record is being used by DPI.

When the information has been entered, click on the Save button.

When assignments are entered, the application attempts to verify the information. When there are issues with the data a validation error will display. This validation error message will be displayed inside an orange colored box. An example is shown in this sample screen:

The screenshot displays the WISEid application interface. At the top, the Wisconsin Department of Public Instruction logo is visible. The navigation bar includes links for Home, WISEid Help, and Logout. The main content area shows the 'Edit Staff' page for a user named '4057588264 - Amera Roy'. A prominent orange box labeled 'Validation Errors' contains the message: 'Error: Missing required data: contract salary'. An arrow points from this message box to the 'Contract Salary' field in the 'Current Year Contract Details' section. The form includes sections for 'Personal Information' (Birthdate, Gender, Entity ID, Racial Ethnic Category) and 'Current Year Contract Details' (Contract Days, Contract Salary, Fringe Benefits, Highest Degree, District Experience, Total Experience, Local Use, Local ID). At the bottom, there are 'Save', 'Reset', and 'Cancel' buttons, along with a 'WISEid feedback' link.

New assignments can be added under the Current Position(s) section. To begin, click on the Add Assignment button. You will see this screen:



The screenshot shows the WISEid web application interface. At the top, there is a header with the Wisconsin Department of Public Instruction logo and the text 'WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION'. Below the header, a navigation bar includes 'Home', 'WISEid Help', 'Welcome Testy McTesterton', 'Agency: Deerfield Community School District', and a 'Logout' button. The main content area is titled 'Staff / Edit Staff / Assignment' and displays the staff member's ID '4057588264 - Amera Roy'. The interface is divided into two tabs: '1 Enter Assignment Information' (active) and '2 Complete Survey'. The 'Enter Assignment Information' tab contains several dropdown menus and text input fields: 'Position' (Select position...), 'Assignment' (Select assignment area...), 'Working LEA' (Select Working LEA...), 'Working School' (Select Working School...), 'Local Use' (text input), 'Local Assignment Title' (text input), and 'Local ID' (text input). At the bottom of the form are 'Continue' and 'Cancel' buttons. On the left side, there is a sidebar menu with categories: 'Person' (Search/Edit, Report duplicates), 'File Tasks' (Upload, Results, Review matches, Download transaction history), 'Reports / Validations' (Staff list, Manage Staff Data, Validate Staff Data), and 'Admin menu' (Debug features, Update contact info). The footer of the page includes the Wisconsin Department of Public Instruction logo, contact information for the State Superintendent of Public Instruction Tony Evers, and a 'WISEid feedback' button.

## Enter Assignment Information Fields:

POSITION	Assignment position's two digit Position Code with description
ASSIGNMENT	Four digit Assignment Code with description
WORKING LEA	Four digit DPI LEA Code with LEA Name
WORKING SCHOOL	Four digit DPI School Code with School Name
LOCAL USE	Optional field for districts to use for providing additional information for titles when reporting assignments as 99/0000
LOCAL ASSIGNMENT TITLE	Optional- It is needed for "99-0000" assignments
LOCAL ID	A local assignment ID for this record. Unique field to be used by your agency for verification purposes to make sure the correct local staff record is being used by DPI.



Once information has been entered in the desired fields, click on the Continue button, unless there is a Save button which means there are no further questions to answer and the information should be saved.

WISCONSIN DEPARTMENT OF  
PUBLIC INSTRUCTION

Welcome Testy McTesterton Agency: Deerfield Community School District

Home WISEid Help Logout

Person  
Search/Edit  
Report duplicates

File Tasks  
Upload  
Results  
Review matches  
Download transaction history

Reports / Validations  
Staff list  
Manage Staff Data  
Validate Staff Data

Admin menu  
Debug features  
Update contact info

Staff / Edit Staff / Assignment

4057588264 - Amara Roy

1 Enter Assignment Information 2 Complete Survey

Full Time Equivalent Percent for this assignment

Is this assignment being performed by a subcontracted individual? ☐ Yes ☐ No

Back Save

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WISEid feedback

If applicable, enter the requested information and click the Save button. The information entered here will vary depending on the position's dynamic questions.

## Possible Dynamic Questions:

FTE Percentage	Full Time Equivalent (FTE) of the person's assignment limited to 1 to 149. For example, represented as a percentage, 001 would be 1% and 149 would be 149%.
Number of Classes	Number of classes person taught as part of their assignment. Limited to a number 1 to 40.
Bilingual Program	Y/N does the person for this assignment teach in a state or locally funded bilingual program?
Long Term Sub	Y/N is this assignment being performed by a long-term substitute?
School Board Approved Alternative Education Program	Y/N is this assignment being performed by a School Board approved alternative education program?
Subcontracted through a Contracted Agency	Y/N is this assignment being performed by a subcontracted individual?
Grade Levels	Grade levels person teaches as part of this assignment.
NCLB Math	Number of classes that are NCLB Math courses person taught as part of this assignment. Must be 0 to 10.
NCLB Science	Number of classes that are NCLB Science courses person taught as part of this assignment. Must be 0 to 10.
NCLB Social Studies	Number of classes that are NCLB Social Studies courses person taught as part of this assignment. Must be 0 to 10.
NCLB World Language	Number of classes that are NCLB World Language courses person taught as part of this assignment. Must be 0 to 10.
NCLB Arts	Number of classes that are NCLB Arts courses person taught as part of this assignment. Must be 0 to 10.
NCLB English	Number of classes that are NCLB English courses person taught as part of this assignment. Must be 0 to 10.

A person can have assignments in multiple working LEA's, as shown in this screen example:

[Results](#)  
[Review matches](#)  
[Download transaction history](#)  
**Reports / Validations**  
[Staff list](#)  
[Manage Staff Data](#)  
[Validate Staff Data](#)  
  
**Admin menu**  
[Debug features](#)  
[Update contact info](#)

Birthdate  
12/12/1999
Gender  
Female
Entity ID

Racial Ethnic Category  
0037 - White

Current Year Contract Details

Contract Days  
100
Contract Salary  
50000.00
Fringe Benefits  
Highest Degree  
Associate degree

District Experience  
Total Experience  
Is the salary final for this school term?  
☐ Yes ☒ No

Local Use  
Local ID

Save Reset Cancel

Current Position(s)

Add Assignment

	Position	Area of Assignment	Working LEA	Working School	FTE	Assignment Type	
+	50 - School Social Worker	0000 - No Description Beyond Position	0007 - Abbotsford School District	9100 - Rural Virtual Academy	50	Professional - Special Education	Edit Delete
+	06 - Assistant District Administrator	0000 - No Description Beyond Position	0091 - Alma Center School District	0000 - District-wide	50	Professional - Regular Education	Edit Delete

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Assignments in multiple working LEA's.

An assignment can be edited by clicking on the Edit icon, located to the left of the red “X” icon. The edit screen is the same as the creation screen. A user can edit assignments only if their selected agency (displayed in the dark blue header of every screen) is the hiring LEA.

An assignment can be deleted by clicking on the corresponding red “X” icon.

CST-WISEdata User Docu... x WISEid detailed document... x DPI's Secure Home Inform... x Edit Staff - WISEid x

https://uawisedata.dpi.wi.gov/WISEid/Staff/Staff/Edit/6651573

Manage Staff Data  
Validate Staff Data

Admin menu  
Debug features  
Update contact info

### Current Year Contract Details

Contract Days:  Contract Salary:  Fringe Benefits:  Highest Degree:

District Experience:  Total Experience:  Is the salary final for this school term?  
☐ Yes ☒ No

Local Use:  Local ID:

### Current Position(s)

	Position	Area of Assignment	Working LEA	Working School	FTE	Assignment Type	
<input checked="" type="checkbox"/>	50 - School Social Worker	0000 - No Description Beyond Position	0007 - Abbotsford School District	9100 - Rural Virtual Academy	50	Professional - Special Education	<input type="button" value="edit"/> <input type="button" value="delete"/>
<div>Details</div> <p>Is this assignment being performed by a subcontracted individual? False</p> <p>Is this assignment being performed by a long term substitute? False</p>							
<input checked="" type="checkbox"/>	06 - Assistant District Administrator	0000 - No Description Beyond Position	0091 - Alma Center School District	0000 - District-wide	50	Professional - Regular Education	<input type="button" value="edit"/> <input type="button" value="delete"/>

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WISEid feedback

12:29 PM  
1/9/2015

Click on the plus icon to the left of a position to view details of that position. These are the dynamic assignment questions and will change depending on the assignment details.

# Report Duplicates

It is possible that duplicate WISEid's may be created for the same person. Any duplicates should be reported to DPI for review.

To report a duplicate, begin by clicking on the **Report Duplicates** link, located under the Person menu on the left hand navigation pane.

Enter the two WISEid's you believe to be duplicates. For example, if James Jones, birthdate 1/1/2001 has the WISEid 234567, and Jim Jones, birthdate 1/1/2001 has the WISEid 256789, and you believe that both ID's describe the same person, enter both ID's on this screen. The order does not matter.

DPI staff will review the submissions and if necessary merge duplicate records into one. All WISEid's will remain valid, but only one will be considered the active WISEid. Subsequent updates may be made only to the active WISEid.

# File Tasks

## Upload

Upload your data to DPI via a CSV file. A sample Person template is available to assist you with formatting the CSV file.

The screenshot shows the 'Staff / Upload' page in the WISEid system. The interface includes a top navigation bar with the Wisconsin Department of Public Instruction logo, user information (Welcome Testy McTesterton), agency selection, and a school district dropdown. A left sidebar contains navigation links for Person, File Tasks, Reports / Validations, and an Admin menu. The main content area is titled 'Staff / Upload' and contains the following elements:

- A blue arrow pointing right with the text: "Choose which upload type to either upload data for that upload or to download the matching upload template file."
- An "Upload Request Type" dropdown menu currently set to "Person".
- A blue arrow pointing right with the text: "Would you like to download the sample Person template?". An orange callout box points to this text with the instruction: "Download a sample file here to view example headers."
- A section titled "Upload CSV File" containing:
  - A "Choose Data File:" label with an orange arrow pointing to it. Below it is a "Choose File" button and the text "No file chosen". An orange callout box points to this area with the instruction: "Navigate to the file you wish to upload."
  - An "Upload" button with an upward arrow icon.

The latest WISEid detailed file specifications along with these templates can also be found on the DPI public website at <http://dpi.wi.gov/wisedata/vendors>



## Upload File Specifications:

WISEid	The WISEid – unique state ID for Wisconsin staff & students.
Local Person ID	Agency's unique identifier for the person, assigned by SIS, HR system, etc.
Last Name	The person's last name
First Name	The person's first name
Middle Name	The person's middle name
Suffix	A suffix to the person's name, if applicable
Birthdate	The person's birthdate, in this format: MM/DD/YYYY
Gender ID	The person's gender
Race Key	Code corresponding to the person's identified racial/ethnic group(s)
Alias Last Name	The person's former and/or other last name
Alias First Name	The person's former and/or other first name
Alias Middle Name	The person's former and/or other middle name
Alias Suffix	The person's former and/or other name suffix
Entity ID	DPI-assigned educator licensing file identification number

## Results

Use the Results link to view file uploads types and statuses. Use these results to find the cause of errors and to investigate potential matches that need to be resolved-- Note that you must wait for the file to finish processing and show 'Completed' before you can do so. In the resulting list you can click the Download button to get a file to upload into your system.

Your upload will result in one of three outcomes:

1. There is a problem with the file layout. An error message will displayed indicating what was wrong with the file.
2. The file format is okay, but the application detected a fatal data error. This means that the data error is so severe that the information cannot be uploaded. The application will display these data error(s) for review.
3. The upload was successful. The application will display the Results screen, which is also accessible from the **File Tasks** menu in the left hand navigation pane. Note that successfully uploaded data may contain errors that need to be corrected.

The screenshot shows the WISEid Staff Results page. The top navigation bar includes 'Home', 'WISEid Help', 'Welcome Jack Frost', 'Agency: Madison Metropolitan School District', 'Change Agency', and 'Logout'. The left sidebar contains a 'Person' section with 'Search/Edit' and 'Report duplicates', a 'File Tasks' section with 'Upload', 'Results', 'Review matches', 'Download transaction history', and a 'Reports / Validations' section with 'Staff list', 'Manage Staff Data', and 'Validate Staff Data'. The 'Admin menu' includes 'Settings', 'Manage positions', 'Manage areas', 'Manage position areas', 'Manage synonyms', 'Toggle features', 'View or maintain search matching algorithm', 'Resolve duplicates', 'Debug features', and 'Update contact info'.

The main content area is titled 'Staff / Results' and contains a description: 'File queue of all file uploads types and their status is located here. Shows status while files are not yet complete and also after completion. When file processing is complete you can drill into errors for causes and drill into potential matches to be resolved. Downloads provide an upload results file including results and any errors.' Below this is a search form with 'File Name', 'Status', 'Request Type', and a 'Search' button.

The table below shows the upload queue:

Type	File name	Status	Errors	Potential matches	Committed	Upload date	User	
C	Contract test entity ID non m atch.csv	Completed	0		0	01/09/2015 08:10:36 AM	WISEidT est	
P	WISEid Persons case.csv	Completed	1	0	0	01/08/2015 02:59:15 PM	WISEidT est	<a href="#">Download</a>
P	Demo_1.csv	Completed	1	2	20	01/08/2015 02:59:14 PM	WISEidT est	<a href="#">Download</a>
P	Demo_3.csv	Completed	2	0	2	01/08/2015 02:56:25 PM	WISEidT est	<a href="#">Download</a>
P	WISEid Persons (10).csv	Completed	0	0	1	01/08/2015 02:29:11 PM	WISEidT est	<a href="#">Download</a>
P	WISEid Persons (10).csv	Completed	0	0	1	01/08/2015 02:22:35 PM	WISEidT est	<a href="#">Download</a>
P	WISEid Persons (10).csv	Completed	0	0	1	01/08/2015 02:20:54 PM	WISEidT est	<a href="#">Download</a>

Callouts from the image:

- To research errors.** (Points to the 'Errors' column)
- To view potential matches.** (Points to the 'Potential matches' column)
- To download person upload transaction results.** (Points to the 'Download' button)

First we will look at Errors, followed by Potential Matches and then Downloads.

## Errors

Click on the number under the Errors column to view those errors. Depending on the type of upload, you will see an error reporting interface unique to that upload type. If you have many errors, it maybe more efficient to open the [Results Download](#) file to locate errors.

Here are examples of the error reporting interfaces for person and assignment uploads:

## Person Upload Example

The screenshot shows the 'Person Error Review' page in the WISEid application. The left sidebar contains navigation links for Person, File Tasks, Reports / Validations, and Admin menu. The main content area displays a table of upload errors for staff members.

Row Number In File	Local Person Id	First Name	Last Name
2	Cent0021	Chai	Agarkar
		Column	Value
		RaceKey	Required field is missing, Race Key. Race Key must be a valid a value from the defined list.
3	Cent0022	Tea	Dhoni
4	Cent0023	Latte	Singh
5	Cent0024	Chai	Karthik
6	Cent0025	Tea	Khan
7	Cent0026	Latte	Mongia
8	Cent0027	Chai	Pathan
9	Cent0028	Tea	Raina
10	Cent0029	Latte	Sehwag
11	Cent0030	Chai	Seth

Page navigation: 1 - 10 of 23 items

## Assignment Upload Example

The screenshot shows the 'Assignment Error Review' page in the WISEid application. The left sidebar contains navigation links for Person, File Tasks, Reports / Validations, and Admin menu. The main content area displays a table of upload errors for assignments.

Row Number In File	Local Id
2	Test003
Column	Value
WorkingSchoolCode	0210
--- Invalid School Code For given working LEA code.	
3	Test004

Page navigation: 1 - 2 of 2 items

It is possible for multiple errors to exist in a single field. Each row represents a single error. Click on the Plus sign icon to view the error details.

**Staff Contract Error Review**

Experience	Total Years Experience	Salary	Fringe Benefits	Salary Code	Contract Days	Entity ID	Local Use
	5	10000	3000	Y	120	11212343\$%%	test

1 - 1 of 1 items

The Contract Error Review shows the complete data for each record and highlights errors in orange.

## Potential Matches

Click on the number under the Potential Matches column to view the potential matches. You can also choose **Review Matches** from the File Tasks menu.

**Potential matches found**

Some of the people you upload may match existing people in our system. Please review all potential matches to avoid creating duplicates.

Local Person ID	First name	Middle name	Last name	Suffix	Gender	Birthdate	Race	Entity ID		
646646	Randall		Richter		M	11/3/1959	0037		Review	Remove
638351	Terese		Masiarchin		F	3/19/1974	0037		Review	Remove
173951	Jill		Jacobs		F	10/26/1958	0037		Review	Remove
3646	Kathleen		Chatterson		F	8/22/1959	0037		Review	Remove
144482	Jill		Blaedow		F	11/21/1962	0037		Review	Remove
160846	Lynn		Lugo		F	9/20/1961	0037		Review	Remove
248309	Sheryl		Beres		F	5/22/1959	0033		Review	Remove
386191	Lynn		Weinfurter		F	2/15/1975	0037		Review	Remove
570283	Stacey		Cooper		F	10/27/1965	0035		Review	Remove
599966	Sandra		Hein		F	8/8/1958	0037		Review	Remove
729619	Martha		Gingras		F	12/23/1968	0037		Review	Remove
350300	Richard		Tobias		M	12/15/1962	0037		Review	Remove
144809	Shannon		Wahl		F	11/10/1967	0037		Review	Remove



Click the Remove button to delete the potential match if it is not correct. Click the Review button to review a potential match.

Staff / Results / Review matches / Resolve Potential Matches

Does this person match an existing record?  
We found a match that seems similar to an existing person in our system. Please verify if this person matches one of these people.

Here is the record you uploaded:

Local Person ID	First name	Middle name	Last name	Suffix	Gender	Birthdate	Race
144482	Jill		Blaedow		F	11/21/1962	0037 - White

Radio buttons.

Here are the existing people that look similar:

Details	WISEid	Local Person ID	First name	Middle name	Last name	Suffix	Gender	Birthdate	Race
<input type="radio"/> <input type="radio"/>	<input checked="" type="radio"/>	24073	Jill		Blaedow		Female	11/21/1962	White
<input type="radio"/> Create a new person (this person does not match any of the above)									

Next Cancel

Displayed here are people the system determined are potential matches to the person uploaded. To view any aliases associated with the potential match, click on the Plus icon under the Details column in the blue box. If you determine that this is a match to the uploaded person, click on the radio button located between the Details and WISEid columns for that person in the blue box. On the following screen you have the option of accepting or cancelling the match.

If you didn't find the match, then click the radio button next to "Create a new person (this person does not match any of the above)". On the following screen you have the option of accepting or cancelling the creation of the new person record.

## Results Download

From the Results screen, click the Download button next to a person transaction. This will save a CSV file to your local PC containing all information, including any changes made using the user interface screens. This file could be used to update or automate changes in your local information system—SIS, HR system, etc.

The Status and Message Text columns in this chart indicate which type of processing transaction each row represents. A single upload transaction may have multiple rows indicating multiple statuses.

## Results Download Statuses and Messages:

Status	Message Text
Upload Request	Automatched
Upload Request	Sent to Match Review
Upload Request	Error
Update Request Info Message	Entity ID in upload doesn't match the WISEid person Entity ID.
Update Request Info Message	Only alias and Local Person ID additions are allowed for this auto match record. If additional changes are needed please contact DPI WISEid support to have them made.
Upload Request	Removed from Match Review
Committed	Create new person by Review Matches
Committed	Create new person by Upload
Committed	Match completed by Review Matches
Committed	Create new person through UI
Committed	Automatched with update of data
Committed	Update person from UI

The **Results Download File Specifications** are the same as those for the [Download Transaction History](#) that are under the Download Transaction History section. The only difference between these files is the Results Download gives you just the transactions related to the currently selected individual file upload.

## Review Matches

See “[Potential Matches](#)” under the Results section above. These are two methods of viewing the same potential matches.

## Download Transaction History

Download your transaction history by clicking on the link under File Tasks. A CSV file containing your history will be downloaded to your local PC. ‘Download transaction history’ is a catchall for anything users wish to pull out of the system. By entering a date range you may gather all the potential matches resolved in a specific period, gather information on duplicate merges completed by DPI, review record modifications and more.



WISCONSIN DEPARTMENT OF PUBLIC INSTRUCTION

Welcome Testy McTesterton Agency: School District

Home WISEid Help Change Agency Logout

Person  
Search/Edit  
Report duplicates

File Tasks  
Upload  
Results  
Review matches  
Download transaction history

Reports / Validations  
Staff list  
Manage Staff Data  
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Admin menu  
Debug features  
Update contact info

Staff / Download transaction history

Select a beginning and end date range to download all transaction results history including errors in CSV format.

From  
01/01/2014

To  
12/14/2014

Download

CSV file is downloaded (this example is from the Chrome browser).

TH\_1309\_0000\_01012....csv

Show all downloads..

The Download Transaction History file could be used to update or automate changes in your local information system—SIS, HR system, etc. This is similar to the person results download except that all download types are included.

The Status and Message Text columns in this chart indicate which type of processing transaction each row represents. A single upload transaction may have multiple rows indicating multiple statuses. These files may be very large so you may want to open them in Excel and use sorts and/or filters to locate groups of data.

## Download Transaction History Statuses and Messages:

Status	Message Text
Upload Request	Automatched
Upload Request	Sent to Match Review
Upload Request	Error
Update Request Info Message	Entity ID in upload doesn't match the WISEid person Entity ID.
Update Request Info Message	Only alias and Local Person ID additions are allowed for this auto match record. If additional changes are needed please contact DPI WISEid support to have them made.
Upload Request	Removed from Match Review
Committed	Create new person by Review Matches
Committed	Create new person by Upload
Committed	Match completed by Review Matches
Committed	Create new person through UI
Committed	Automatched with update of data
Committed	Update person from UI
Committed	Student imported from WSLs

## Download Transaction History File Specifications:

Field	Description
WISEid	The WISEid – unique state ID for Wisconsin staff & students.
Local Person ID	Agency's unique identifier for the person, assigned by SIS, HR system, etc.
Last Name	The person's last name
First Name	The person's first name
Middle Name	The person's middle name
Suffix	A suffix to the person's name, if applicable
Birthdate	The person's birthdate, in this format: MM/DD/YYYY
Entity ID	DPI-assigned educator licensing file identification number
CurrentLocalPersonID	As of when this file was generated the person's current local person ID.
CurrentLastName	As of when this file was generated the person's current last name.
CurrentFirstName	As of when this file was generated the person's current first name.
CurrentMiddleName	As of when this file was generated the person's current middle name.
CurrentSuffix	As of when this file was generated the person's current last suffix.

CurrentBirthdate	As of when this file was generated the person's current last name.
CurrentEntityID	As of when this file was generated the person's current ELO Entity ID.
TransactionId	Processing transaction identifier
TransactionDate	Date when the transaction was processed
UploadRequestId	If uploaded by a file upload the files unique request id.
Status	Status of the transaction – see Statuses and Messages table above for possible classifications.
MessageText	If a user message is generated it is displayed here.
ErrorNumber	Number of error message
ErrorText	Error description

# Reports / Validations

## Staff List

The Staff List link under the Reports / Validations section provides a list of persons that have been uploaded with contract or assignment information. The list is searchable by Name, WISEid and/or Position. Click the Plus icon to the left of the WISEid to expand the display and view more details. Click the Edit icon to the right of the Age column to edit Personal, Contract or Assignment information.

The screenshot shows the WISEid Staff List interface. The top navigation bar includes links for Home, WISEid Help, Change Agency, and Logout. The left sidebar contains a menu with sections: Person (Search/Edit, Report duplicates), File Tasks (Upload, Results, Review matches, Download transaction history), and Reports / Validations (Staff list, Manage Staff Data, Validate Staff Data). The main content area is titled 'Staff / Staff list' and includes a search form with fields for First Name, Last Name, WISEid, and Position, along with a Search button. Below the search form is a table of staff members. The first row is expanded, showing a 'Position(s)' section with a table of assignments. Annotations with orange boxes and arrows highlight the 'Expand to show more details.' link (a plus icon next to the WISEid) and the 'Edit button.' (an edit icon next to the Age column).

Details	WISEid	Name	Gender	Salary	Fringe benefits	Contract days	Birthdate	Age											
[-]	1005562244	DEHLI, WILLIAM	Male	\$85,000.00	\$5,412.00	300	02/13/1988	26	[Edit]										
<b>Position(s)</b> <table border="1"> <thead> <tr> <th>Working LEA</th> <th>Working School</th> <th>Position</th> <th>Area of Assignment</th> <th>FTE</th> </tr> </thead> <tbody> <tr> <td colspan="5"></td> </tr> </tbody> </table>										Working LEA	Working School	Position	Area of Assignment	FTE					
Working LEA	Working School	Position	Area of Assignment	FTE															
[+]	1003115214	HADFIELD, THOMAS	Male	\$75,000.00	\$1,122.00	300	04/24/1996	18	[Edit]										
[+]	1001143386	poulos, john	Male	\$30,000.00	\$5,000.00	20	12/15/1987	27	[Edit]										
[+]	1001502098	SMITH, JOEY	Male	\$100,000.00	\$1,000.00	23	01/12/1989	26	[Edit]										
[+]	1004112431	WALDERA, THOMAS	Male	\$50,000.00	\$1,100.00	150	09/09/1986	28	[Edit]										
[+]	1002887295	WOGER, WILLIAM	Male	\$60,000.00	\$825.00	200	02/05/1986	28	[Edit]										

1 - 6 of 6 items

## Validate Staff Data

To validate staff data, click on **Validate Staff Data** under the **Reports / Validations** menu.



Staff / Validate Staff Data

Staff Data Validation Check is Complete. The following errors were found.

Type	Code	Description	
Information		Entity ID in upload doesn't match the WISEid person Entity ID.	<a href="#">Resolve</a>
Information		Entity ID in upload doesn't match the WISEid person Entity ID.	<a href="#">Resolve</a>

1 - 2 of 2 items

The Validate Staff Data option is used to run validations on the uploaded staff data—assignments and contracts. Errors and informational messages will display—see the example above. Click the Resolve link on the right to fix the error or address the message. The user will be taken to the appropriate screen.

## Person List by Local Person ID

If your Hiring LEA has attached a Local Person ID to a WISEid person the person list including WISEid for your Hiring LEA will show up here in CSV format. If you attached multiple Local Person IDs to the same person they will show up multiple times – one row per Local Person ID. The CSV file may take a few seconds to download so be patient. It will show up in your Internet Browser file downloads when complete.

[Reports / Validations](#)  
[Person List by Local Person ID](#)

### Person List by Local Person ID File Specifications:

Field	Description
LocalPersonID	Agency's unique identifier for the person, assigned by SIS, HR system, etc.
LocalPersonIDDescription	Description on how the LocalPersonID was created for a person if available.
WISEid	The WISEid – unique state ID for Wisconsin staff & students.
LastName	The person's last name
Suffix	A suffix to the person's name, if applicable

FirstName	The person's first name
MiddleName	The person's middle name
Birthdate	The person's birthdate, in this format: MM/DD/YYYY
Gender	Reported gender of person
RaceKey	Reported RaceKey of person in DPI code format.
EntityID	As of when this file was generated the person's current ELO Entity ID.

## Manage Staff Data

[Staff](#) / Manage Staff Data

Delete Staff Contracts

Delete Staff Contracts & Assignments

Historical Person Download

Upload Historical Person CSV File

Choose Data File:

Choose File No file chosen

Upload

Historical Contract Download

Historical Assignment Download

Contains a number of high level agency admin functions. Including:

- **Delete Staff Contracts** – Deletes all of the hiring agency staff contracts for the current year.
- **Delete Staff Contracts & Assignments** – Deletes all of the hiring agencies contracts and assignments for the current year.
- **Historical Person Download** – downloads special store of historical records used in process to correct data and join WISEids to the person in CSV file download format. Will be used only in first release of application and will go away soon once all districts have historical data joined to WISEids.
- **Upload Historical Person CSV File** – Used by the LEA to upload corrected data from Historical Person Download back into the historical data store.
- **Historical Contract Download** – Once the [First Year Historical Staff Data Bridge Process](#) step 4 is complete this can be used to create a Contract Upload file of last years data to be uploaded into **File Tasks > Upload**. Data can be corrected in Excel before the upload.
- **Historical Assignment Download** – Once the [First Year Historical Staff Data Bridge Process](#) step 4 is complete this can be used to create a Assignment Upload file of last years data to be uploaded into **File Tasks > Upload**. Data can be corrected in Excel before the upload.



# Admin Menu

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## Settings

It is possible to toggle the Local Person ID requirement on and off. **DPI highly suggests that all districts require the Local Person ID this is the default setting**, but it may be toggled off under the Admin menu if the user has the appropriate privileges.

## Update Contact Info

Here the agency administrator updates WISEstaff system contact information. Both Primary and Secondary Contact are required for each agency and must be updated each year. Use the Edit or Delete icons to the right of the email address to make changes or delete a contact.